
	Policy for Budget Reporting	
Continuing Education Department	Original Date: 5/15/2015 Revision Date: 4/2/2020 Effective Date: 10/22/2020	Approved By:  <hr/> Thomas Nowicki, MD System Director of Medical Education Approval Date: 10/22/2020

Purpose:

The purpose of this policy is to define the requirements for submitting budget information related to Continuing Education (CE) activities within Hartford HealthCare. This policy is designed to give the host/sponsoring department(s)/organization(s) an understanding of the various incomes and expenses associated with hosting an educational activity. The budget information will also be used to reconcile the program at the conclusion of the event, for CE reporting purposes. This Policy is to be used in conjunction with the HHC CE Policy for Independence and Commercial Support. Failure to follow this policy will adversely affect the status of Hartford HealthCare as an accredited provider of CE.

Scope:

This policy applies to all educational activities approved for CE.

Policy:

- A post-event budget reconciliation will be required of all CE programs for which there is (a) a registration fee charged, or (b) vendor or exhibitor space rental fees, or (c) commercial support provided.
- Within 30 business days following the conclusion of the CE Activity, documentation of all final expenses and income must be submitted to the CE Team.
- The reconciled budget form will include copies of all receipts and/or payment request forms related to the educational activity.
- In-kind contributions will be identified solely by a description of the support, and not a monetary amount.
- For any activity in which money is exchanged for services, the sponsoring department must follow the HHC Vendor Interaction Policy and the HHC Conflict of Interest Policy.
- Any Activity Medical Director who does not abide by this policy will be placed on CE probation, and future CE activities from this Activity Medical Director may not be approved for CE credit.

Definitions:

- *Expenses*: Costs associated with conducting an educational activity. These include marketing, meeting space and logistics, faculty honoraria and travel, and CE certification expenses.
- *Income*: Funds earned and being used to support the CE Activity. These may be from registration fees, commercial support, in-kind contributions, exhibits, vendors or other means.
- *CE Team*: The Hartford HealthCare Continuing Education Team
- *Sponsoring department/organization*: The department or organization responsible for planning, presenting and evaluating the CE Activity

References:

- [ACCME Standards for Commercial Support](#)

Related Policies:

- HHC Vendor Interaction Policy
- HHC Conflict of Interest Policy
- HHC CE Policy for Independence and Commercial Support
- HHC CE Probation Policy

Related Documents:

- CE Budget Template Form